International Forms Application Administrator Training v1.0

August 2023

ADMINISTRATION FOR
CHILDREN & FAMILIES
Office of Child Support Services

Agenda

- [Module 1: iForms Introduction and Overview](#)
- [Module 2: State Administrator](#)
- [Module 3: OCSS Administrator](#)
- [Questions](#)

Training Resource

- *iForms Navigation Guide* is a complete guide to iForms for caseworkers, managers, and administrators.

- Available June 2023

Child Support Portal Navigation Guide for iForms

ADMINISTRATION FOR
CHILDREN & FAMILIES

Office of Child Support Services
330 C Street SW, 5th Floor
Washington DC 20201

June 2023
Version 1.0

Module 1: iForms Introduction and Overview

International Forms – Child Support Portal

[Child Support Portal Navigation Guide for iForms – Section 2.1]

iForms Introduction and Overview

- iForms:
  - Tool for creating the required forms for international case applications with 2007 Hague Convention child support partners
  - Available for all state child support caseworkers
  - No state programming is required
  - Manages child support services application forms
  - Not the system of record for a case
- State case management system:
  - System of record for all cases and all actions taken on a case
  - Forms generated in iForms are added to the state system according to state policy.
- In production since June 2023

[Child Support Portal Navigation Guide for iForms – Section 2.1]

iForms Workflow

Create case → Create application → Complete forms → Approve forms → Download translated forms → Send forms to foreign Central Authority
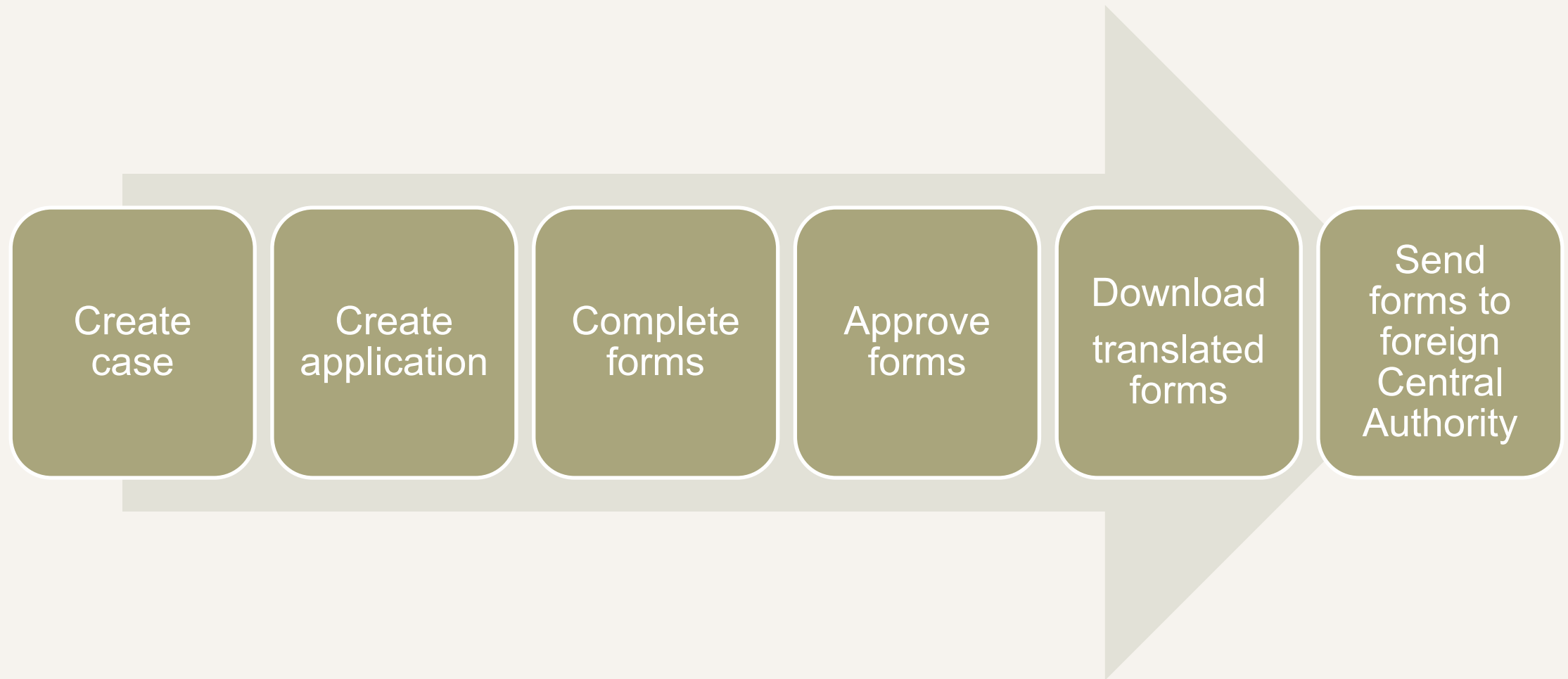
iForms Design

- Follows familiar processes for caseworkers – create a case, choose an application, and complete forms
- Caseworkers are presented with only the specific forms for the selected application type.
- Data is prepopulated in forms; required fields are marked with a red asterisk.
- Data that appears in multiple forms is entered once and populates all forms:
  - Examples: Parties' names, date of birth, address
- Data used in all forms is maintained by the State/OCSS administrator and prepopulates forms:
  - Examples: State office address, SDU information, foreign Central Authority address
- Forms are available in multiple languages.
- Flexible to accommodate state preferences and various approaches to case management – for example, individual case assignment or team-based case management

[Child Support Portal Navigation Guide for iForms – Section 2.1]

iForms Home Page

- Home page is specific to the user's role in iForms

- Supports individual assignment of cases or team-based assignment

- Administrators have a different home page.

Caseworker home page

[Child Support Portal Navigation Guide for iForms – Section 2.1]

Introduction and Overview of iForms – Create Case

Create Case

BEFORE YOU BEGIN

You will need:

- State case ID
- Custodial parent and noncustodial parent names and addresses (or you can choose address unknown)
- If application is being brought by a public body: the name, address, phone number, email, and a contact name
- Names of all children and their dates of birth
- Foreign country name
- Whether a determination of nondisclosure should be made for the case

Additional information that is useful but not required. (You can add this later)

- Custodial parent and noncustodial parent date of birth
- Personal identification number for (SSN or another country's identifier for the custodial and noncustodial paren

*The address and contact information for the Foreign Authority will be populated after you choose the foreign countr

Step 1 of 5: Enter case overview information

Caseworker/Team	Office Address
local maryland team	333 Memory Lane, Suite 301, 3rd Floor, Annapo 21401, US

Respond to Incoming Request for Specific Measures

☐

* State Case ID

Enter State Case ID

[Next] [Can]

Step 1: Creating a case

Case details page

Review Case Details and Create Case

Overview

Caseworker/Team:	local maryland team
Office Address:	2345 Middle River Road, Middle River, MD, 21220, US
State Case Id:	MD88888888
Determination of Nondisclosure:	No

Custodial Party

Name:	Julia Pennyworth
Date of Birth:	04/28/1978
Address Type:	state office
Address:	13 Uptown St, Down Town, MD, 28100, US
Phone:	+1 4563936563

Non Custodial Parent

Name:	Bruce Wayne
Date of Birth:	05/10/1977
Address Type:	unknown

Foreign CA

Foreign CA Office:	France Primary office
Foreign CA Address:	TestAddresslane1, Test city, FR
Phone:	+33 123456789
Fax:	987654321
Email:	france@france.com
Contact:	Lastname Firstname

Children

Child 1

Name:	Damian Wayne
Date of Birth:	10/15/2008
Parentage:	Established or Presumed

[Previous] [Create Case] [Cancel]

Introduction and Overview of iForms – Create Application

Create Application

Step 1 of 4: Enter applicant/respondent information

Custodial Party   ● Applicant ○ Respondent
Virginia Pepper Potts

Noncustodial Party   ○ Applicant ● Respondent
Tony Stark

Child is the applicant (incoming application only)
☐

* Available Applicantions (Choose One)

-- Select --   ⌄

[Next]   [Cancel]

Create applications page

Application details page

Review application details and create application

Application

Applicant:	Virginia Pepper Potts
Respondent:	Tony Stark
Child is the applicant (incoming application only):	No
Application Type:	Enforcement - outgoing

Order details

NCP appeared or was served:	No

Support requested

Child support

Child 1

Name:	Anthony Potts-Stark
Date of Birth:	05/29/2002
Support requested:	Yes

Spousal support

Support requested for this applicant as well as children:	No

Additional information

Local Child Support Office Address

Local child support office:	Local Child Support Office (MD2)
Local child support office address:	2345 Middle River Road, Middle River, MD

Case Payment Information

Case reference number for electronic payments:	MD77777777
Case reference number for checks:	MD77777777

[Previous]   [Create Application]   [Cancel]

Introduction and Overview of iForms – Complete Forms

Forms

☐	⇕	Form	⇕	Required or Optional	⇕
☐		EN03 - Application for Enforcement of a Decision or Recognition in Requested State		Required	Re
☐		EN07 - Financial Circumstances +		Required	Ne
☐		EN16 - Transmittal form under Article 12(2)		Required	In

Request Approval   **Cancel**

Required forms section

Prepopulated form example

Convention on the International Recovery of Child Support and Other Forms of Family Maintenance

Application for Enforcement of a Decision Made or Recognized in the Requested State
(Article 10(1) *b*))

CONFIDENTIALITY AND PERSONAL DATA PROTECTION NOTICE

Personal data gathered or transmitted under the Convention shall be used only for the purposes for which it was gathered or transmitted. Any authority processing such information shall ensure its confidentiality, in accordance with the law of its State.

An authority shall not disclose or confirm information gathered or transmitted in application of this Convention if it determines that to do so could jeopardise the health, safety or liberty of a person in accordance with Article 40.

☐ *A determination of non-disclosure has been made by a Central Authority in accordance with Article 40. If this box is ticked, information under sections 2 d, e, f and g and 5 should only be provided in the Restricted Information on the Applicant page of this form.*

1.		* Requesting Central Authority file reference number:	MD77777777
2.		* Particulars of the applicant	
	a.	Family name(s):	Potts
	b.	Given name(s):	Pepper Virginia
	c.	Date of birth [1]	10/04/1972 (dd/mm/yyyy)
	or		
	a.	Name of the public body:	
	b.	Family name(s) of the contact person:	
	c.	Given name(s) of the contact person:	
	and		
	d.	Address:	2345 Middle River Road, Middle River, MD, 21220, US
	e.	Telephone numbers:	+1 5551234567
	f.	Fax number:	
	g.	E-mail:	mdcseuser2@mdcse.org
3		Particulars of the person(s) for whom maintenance is sought or payable	
3.1	☐	* Maintenance is sought or payable for the applicant named above	

Maintenance basis:

- ☑ parentage
- ☐ *in loco parentis* or equivalent relationship
- ☐ marriage
- ☐ analogous relationship to marriage
- ☐ affinity (please identify): _____
- ☐ grandparent   ☐ sibling   ☐ grandchild
- ☐ other _____

PAPERWORK REDUCTION ACT OF 1995 (Pub. L. 104-13) STATEMENT OF PUBLIC BURDEN: The purpose of this information collection is to provide an abstract of a decision in an application under the 2007 Hague Child Support Convention. Public reporting burden for this collection of information is estimated to average 1 hour per response, including the time for reviewing instructions, gathering and maintaining the data needed, and reviewing the collection of information. This is a mandatory collection of information per 45 CFR 303.7. An agency may not conduct or sponsor, and a person is not required to respond to, a collection of information subject to the requirements of the Paperwork Reduction Act of 1995, unless it displays a currently valid OMB control number. If you have any comments on this collection of information, please contact the ACF Reports Clearance Officer by email at infocollection@acf.hhs.gov.

[1] It is not necessary to provide a date of birth in the case of a representative.

Roles

Role Name	Function	
State Caseworker (CC)	• View case data, applications, and forms • Create, manage, and delete data for cases, applications, and forms • Print forms for cases	• Print resource documents • Change assigned caseworker (state's option)
State Manager (can be used as an additional function of the Caseworker role)	• View case data, applications, and forms • Create, manage, and delete data for cases, applications, and forms • Print forms for cases	• View, download, and print resource documents • Approve forms for applications on cases (if selected) • Manage caseload of users and teams by reassigning (if preferred)

[Child Support Portal Navigation Guide for iForms – Section 3.1]

Roles (cont'd)

Role Name	Function	
State Administrator (CS)	• Manage iForms users • If Teams is used, manage iForms teams • Manage state resource documents	• Set up and maintain state office information • Set up and maintain state payment information • Manage state preferences for custodial party's (CP's) address, approval of forms by a manager, and authority to reassign cases
OCSS Administrator (CO)	• Manage Office of Child Support Services (OCSS) resource documents • Set up and maintain foreign authority information • Set up and maintain foreign Child Support Payment Service information	• At the request of a state: – Set up and maintain payment information – Manage iForms users and teams – Set up and maintain office information.

[Child Support Portal Navigation Guide for iForms – Section 3.1]

How iForms Benefits States

- Eliminates need to program the Convention forms

- Helps caseworkers complete forms accurately; all required and optional forms are included in the package sent to the foreign Central Authority

- Reduces manual data entry

- Enhances consistency

- Creates efficient process for form review by managers

- Allows states and OCSS to obtain Convention application metrics

- Makes sure contact information for the foreign Central Authority is accurate at the OCSS level

- Supports state training by allowing states to add state-specific training materials for easy access

Module 2: State Administrator

Initial State Setup

User Acceptance Testing (UAT) environment:

- The UAT environment is recommended for caseworker and manager training.

- If your state has not previously accessed UAT, contact the OCSS Help Desk at csportal@acf.hhs.gov.

- State users new to the UAT environment will be able to register themselves.

Initial State Setup: User and State Profile

- The state determines which users will access iForms and their roles (caseworker/manager or administrator).

- The state person responsible for Child Support Portal access:

  - Assigns users their iForms roles –- Caseworker (CC), Administrator (CS), or both

  - Establishes the state profile information for iForms

  - Establishes the user profile information for iForms

  - Provides the users with the state URL for the UAT environment

- For assistance, email dcs.eteam@acf.hhs.gov.

Note: The process for setting up users and setting up the state must be repeated in the UAT and PROD environments.

Initial State Setup – State Profile

1. Select the state's **Form Completion** option and any non-default Preference selections.

2. Select the **Central Authority Name.**

3. Add the state **Office** information.

4. Add the **Central Registry** information.

5. Add the **Payment** information.

6. Add the teams.

7. Add the iForms user profiles; see the next slide.

Administration Details

State Information   Foreign Country Information   Users and Teams

State Information Details

Central Authority Name   Local Child Support Office   Central Registry Information   Payment Information   Preferences

Central Authority Name

Maryland Child Support Enforcement Office 1

Save

Initial State Setup – User Profile

- For each user profile, the following information is required:
  - Name
  - iForms team (if created)
  - Languages spoken (in addition to English)
  - iForms Office
- Add iForms users by grouping multiple selections in an Office and Team. If multiple users are selected, all are assigned the same office and team.
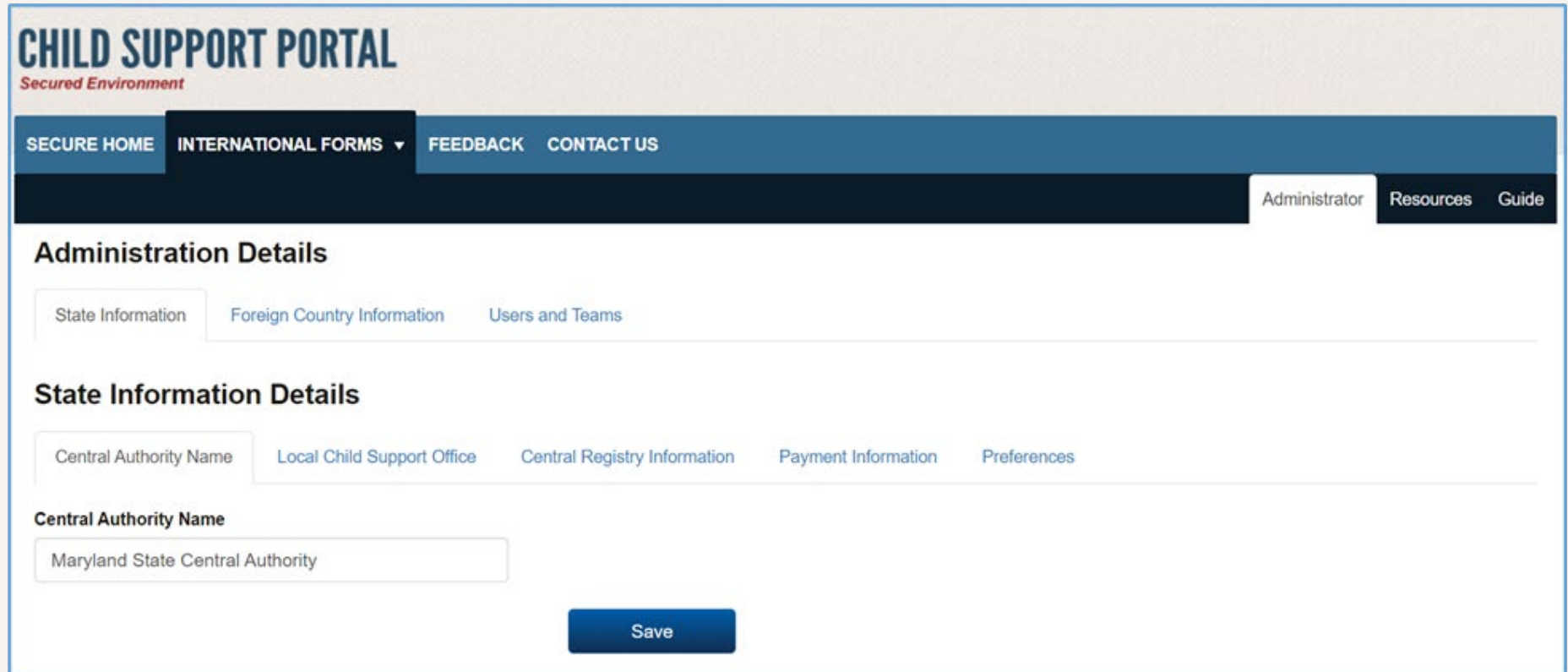
Note: When using the multiple-selection option, skip the **Languages Spoken** attribute and address this as a follow-up edit.

State Administrator – Home Page

All functions for the State Administrator are accessed from the home page by selecting the appropriate tab.

[Child Support Portal Navigation Guide for iForms – Section 3.5]

State Administrator – State Information

State information details can be accessed by selecting **State Information**:

- Central Authority Name

- Local Child Support Office

- Central Registry Information

- Payment Information

- Preferences

[Child Support Portal Navigation Guide for iForms – Section 3.5.1.1]

Central Authority Name

1. Enter the **Central Authority Name**, which assigns a name to the state central authority for use throughout the iForms application:

   - Only one Central Authority Name can be identified

2. Select **Save**.

Administration Details

| State Information | Foreign Country Information | Users and Teams |

State Information Details

| Central Authority Name | Local Child Support Office | Central Registry Information | Payment Information | Preferences |

Central Authority Name

Maryland Child Support Enforcement Office 1

Save

Local Child Support Offices

Local child support offices create and manage office information or upload an Excel file containing the information for all state's offices.

These tasks can be performed on this page:

- Launch the Upload Office page
- Open a current office for updates
- Add a new office
- Delete an office

Note: Before an office can be deleted. all active cases must be reassigned to another office.

[Child Support Portal Navigation Guide for iForms – Section 3.5.1.1]

Local Child Support Offices (cont'd)

To change information:

1. Choose the data fields that need updating.
2. Select **Save**.
3. To return to the **Local Child Support Office** list, select **Cancel**.

]Child Support Portal Navigation Guide for iForms – Section 3.5.1.1]

Local Child Support Offices (cont'd)

To upload a file with local office information:
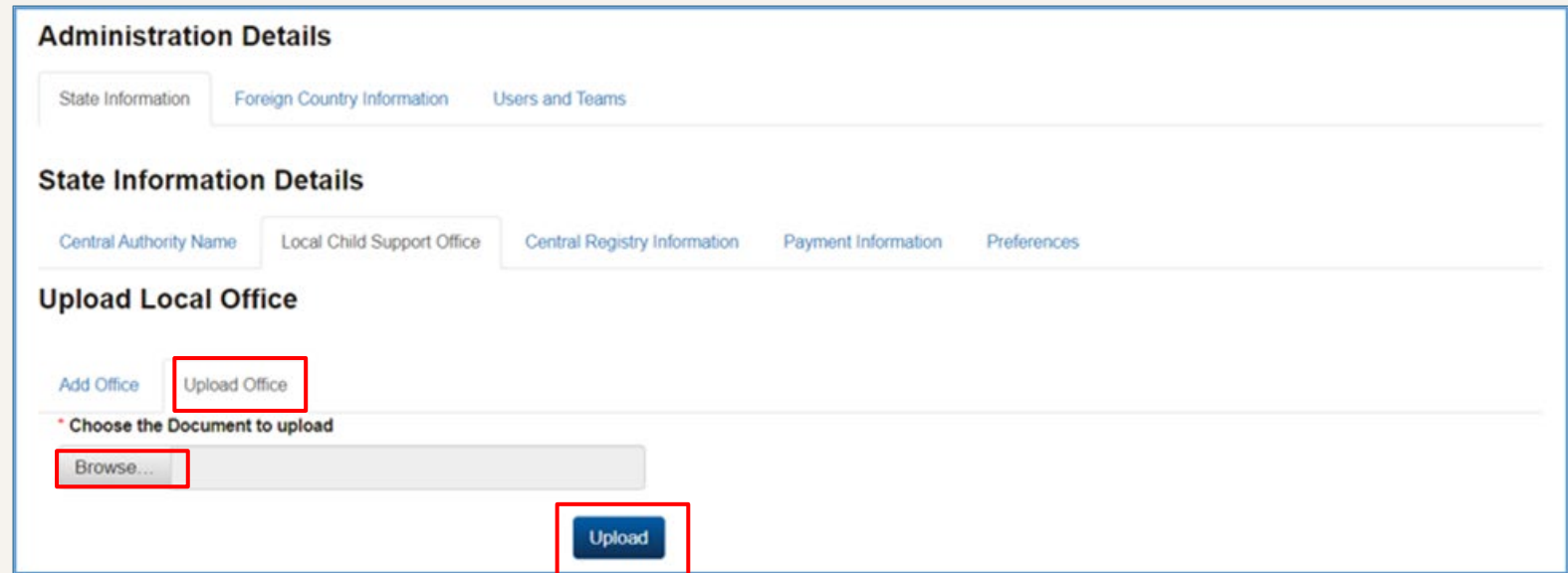
1. Make sure:
   - The file is formatted like the Upload Excel file in Resources.
   - The file has your state code in the name.
2. Select **Upload Office**.
3. Follow the **Browse** prompts to specify the file to upload.
4. Select **Upload**.

Note: The Upload Office process is only available if no state offices exist in iForms.

Central Registry Information

To add the Central Registry information (if one does not yet exist):

1. Select the **Central Registry Information** tab.
2. Enter data is the fields shown.
3. Select **Save**.

Note: There must be one and only one Central Registry per state.

[Child Support Portal Navigation Guide for iForms – Section 3.5.1.1]

Payment Information

1. Select **Payment Information**.
2. Select **Send Payment To: Central Authority Payment Service** or **SDU**:
   - If **Central Authority Payment Service** is selected, details populate automatically and cannot be edited. The OCSS Administrator maintains this data.
3. Enter **Payable To**.
4. Select **Save**.

Note: SDU information is optional. Each state determines the appropriate payment methods for cases.

Preferences

To enter state preferences:

1. Select the **Preferences** tab.
2. Check **Require manager approval of the Forms**.
3. Check **Allow the caseworker to reassign cases to other caseworkers/Teams**.
4. Check **Allow the use of the custodial party's personal address instead of the local child support office address**.
5. Select the user name type for form completion:
   - **Person completing the form** is the default
   - If **Representative**, enter the exact character string to include on the form.

Note: By default, the first three preferences' check boxes are not checked.

Administration Details

| State Information | Foreign Country Information | Users and Teams |

State Information Details

| Central Authority Name | Local Child Support Office | Central Registry Information | Payment Information | Preferences |

Preferences

Require manager approval of the Forms:
☑

Allow the caseworker to reassign cases to other caseworkers/Teams:
☐

Allow the use of the custodial party's personal address instead of the local child support office address:
☑

* Choose the type of user name for form completion:
○ Person completing the form
○ Person approving the form
● Representative

Kara Zor-El

Save

Languages

To view forms in available languages:

1. Select the **Foreign Country Information** tab.

2. Select the **Country**.

3. Select the **Languages** tab.

Note: For State Administrators, Foreign Country Primary Office information is view only.

Administration Details

| State Information | Foreign Country Information | Users and Teams |

Foreign Country Information Details

* **Select Country**

| Albania | ⌄ | | Go |

| Languages | Primary Office | Additional Office |

Translated forms for this country are available in these languages:

Albanian, English, English

[Child Support Portal Navigation Guide for iForms – Section 3.5.1.3]

Primary Office

To show foreign country information:

1. Select the **Foreign Country Information** tab.

2. Select the **Primary Office** tab.

3. Select the **Country**.

Note: For State Administrators, Foreign Country Primary Office information is view only.

Setup: Users and Teams

- Select the **Users and Teams** tab:

  – Member information can be edited.

  – Members can be deleted.

[Child Support Portal Navigation Guide for iForms – Section 3.4.1.4]

Create New User (Step 1 of 3)

To create a user:

1. Select the **Users and Teams** tab.

2. Select **Create New User**.

Note: iForms users must be selected from active Portal users.

[Child Support Portal Navigation Guide for iForms – Section 3.4.1.5]

Create New User (Step 1 of 3 cont'd)

3. Select any combination from the three fields shown.

4. Select **Search**.

Note: iForms users must be selected from active Portal users.

Create New User (Step 1 of 3 cont'd)

5. Select one or more users in the **Select User** column.

6. Select **Next**.

Create User

Step 1 of 3: Select User

Last Name:	First Name:	Email:
Last Name	First Name	Email

Search   Reset

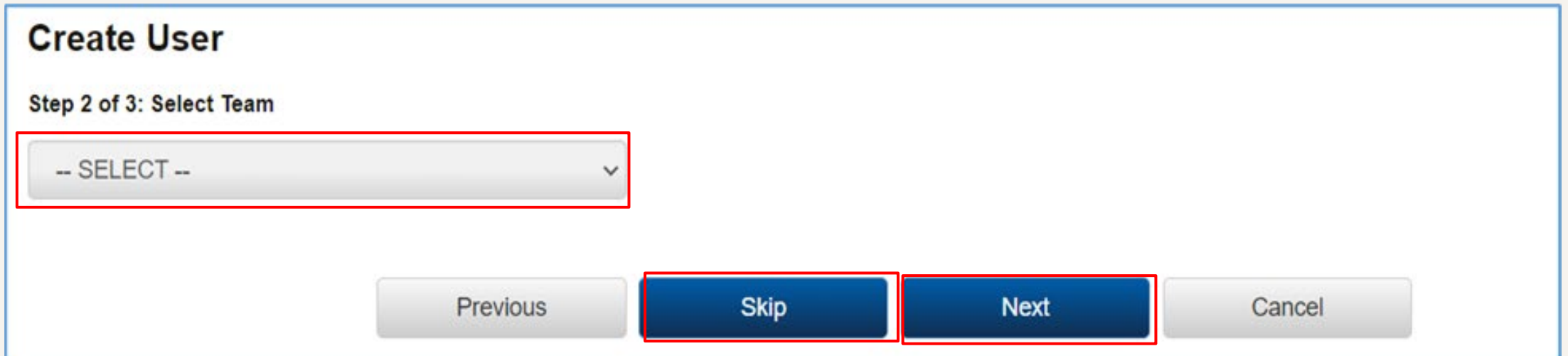|	Select User		Last Name		First Name		Email		Phone
	☐		Holmes		Sherlock		sherlock221b@baker.com		302-252-8770
	☐		Watson		John		johnwat221b@baker.com		
	☐		Lestrade		Garfield		lestrade221b@scotyard.com		
	☐		Hudson		Martha		mhudsont221b@baker.com		

Next   Cancel

Note: iForms users are not required to be members of a team. If multiple users were selected on this page, they must all be assigned to the same office.

[Child Support Portal Navigation Guide for iForms – Section 3.4.1.5]

Create New User (Step 2 of 3)

1. Select the team the users will be a member of (optional).

2. Take one of the following steps:

   • If you selected a team, select **Next**.

   • If you selected no team, select **Skip**.

Note: iForms users are not required to be members of a team. If multiple users were selected on the previous page, they must all be assigned to the same office.

Create New User (Step 3 of 3)

1. In the **Additional Languages** menu, select all the languages the user speaks.

2. If the user is a manager, select the **Role – Manager** check box.

3. In the **Office** menu, select the office the users will work for.

4. Select **Create User**.

Edit User

1. On the **Administrator** tab, select **Users and Teams**.

2. Select the **Last Name** of the user from the **User Information** list.

3. Choose the data fields that need updating.

4. Select **Save**.

Edit User

User Name:	*** Phone Number:**	*** Email**
test user	5557654321	test@ssa.gov
Role - Manager:	*** Office:**	**Address:**
☐	Local Child Support Office	13 Uptown St, Down Town, MD, 28100, US
Selected Languages:	**Additional Languages:**	
French	French	

Save   Cancel

[Child Support Portal Navigation Guide for iForms – Section 3.5.1.6]

Create Team

1. On the **Administrator** tab, select **Users and Teams**.
2. Select **Create New Team.**
3. Enter the **Team Name.**
4. Select the local child support **Office** for the team.
5. Select **State Phone** and, if **Custom Phone** is selected, enter the phone number associated with the team.
6. Select **State Email** and, if **Custom Email** is selected, enter the email address associated with the team.
7. Select **Save**.

Create Team

* **Team Name:**

Enter Team Name

* **Office:**

-- SELECT --

◉ State Phone ○ Custom Phone

◉ State Email ○ Custom Email

Save   Cancel

[Child Support Portal Navigation Guide for iForms – Section 3.5.1.7]

Edit Team

1. In the **Team Name** field, select the team to edit.

2. Choose the data fields that need updating.

3. Select **Save**.

Note: Some data, such as the address of the state office, may not be editable. This information must be changed on the **Local Child Support Office** tab.

Edit Team

Team Name:

Maryland CSE Team 1

○ State Phone ● Custom Phone

○ State Email ● Custom Email

* **Office:**

Local Child Support Office ⌄

* **Phone Number:**

4105555555

* **Email**

MDCSETeam1@mdcse.com

Address:

13 Uptown St, Down Town, MD, 28100, US

[Save] [Cancel]

Delete Team / Edit Members

1. Select the **Users and Teams** tab:

    - To delete a team, select **Delete**.

      iForms prompts for a delete confirmation.

    - To edit members:

        i. Select **Edit Members**.

        ii. Make the updates.

        iii. Select **Save**.

Note: All active cases must be reassigned before a team can be deleted.

[Child Support Portal Navigation Guide for iForms – Section 3.5.1.8]

Add / Edit / Delete State Resource

1. Select the **State Resources** tab.
2. Select the state.
3. Take one of these steps:
   - To add a resource, select **Add State Resource**:
     i. Enter **Resource Name** and **Resource Description**.
     ii. Add a resource using one of the following methods:
         - Direct link to the current URL location of the resource
         - Upload a file to iForms that users can access
     iii. Select **Save**.

[Child Support Portal Navigation Guide for iForms – Section 3.5.1.9]

Add / Edit / Delete State Resource (cont'd)

- To edit a resource's information, select **Edit**.
- To delete a resource, select **Delete**.

Add State Resource

* Resource Name

Enter Resource Name

* Resource Description

Enter Resource Description

* Choose Resource Type

○ Document ○ Link

Save   Cancel

Module 3: OCSS Administrator

OCSS Administrator – Home Page

All OCSS Administrator functions can be accessed from the home page by selecting the appropriate tab.

Administration Details

| State Information | Foreign Country Information | Users and Teams |

State Information Details

* **Select State**

Wisconsin ⌄   [Go]

| Central Authority Name | Local Child Support Office | Central Registry Information | Payment Information | Preferences |

Central Authority Name

Central Authority Name

[Save]

[Child Support Portal Navigation Guide for iForms – Section 3.5.2]

Foreign Country Information – Languages

To change languages:

1. Select the **Foreign Country** tab.

2. In the **Select Country** field, choose the foreign country.

3. Select **Go**.

4. Select the **Languages** tab, which displays the available languages.

5. To add or remove languages, select **Add/Remove Languages**.

6. Select **Save**.

Note: For State Administrators, Foreign Country Primary Office information is view only.

[Child Support Portal Navigation Guide for iForms – Section 3.5.2.1]

OCSS Administrator – Foreign Country Information – Primary Office

1. Select the **Foreign Country Information** tab.

2. Select **Country**.

3. Select the **Primary Office** tab. Edit this Information as needed.

Note: A foreign country can only have one Primary Office. This will usually be the foreign Central Authority.

Foreign Country Information – Add Office

Some foreign countries will manage cases through multiple offices.

To add:

1. Select the **Foreign Country Information** tab.
2. Select the **Foreign Country.**
3. Select the **Additional Offices** tab.
4. Select **Add Office** and complete the information.
5. Select **Save**.

Administration Details

State Information | Foreign Country Information | Users and Teams

Foreign Country Information Details

* Select Country

France [v]   [Go]

Languages   Primary Office   Additional Office

Office Name	Address	City	Country	Phone	Email	Action
Child Support Enforcement of Paris 2	345 Rue de Rivoli	Paris	France	5551234567	cseuser1@csefr.com	Delete

[Add Office]

[Child Support Portal Navigation Guide for iForms – Section 3.5.2.1]

State Information

State information details can be accessed by selecting the **State Information** tab:

1. On the **Select State** menu, select the state.
2. Select **Go**.

Administration Details

| State Information | Foreign Country Information | Users and Teams |

State Information Details

* **Select State**

Wisconsin ⌄   **Go**

| Central Authority Name | Local Child Support Office | Central Registry Information | Payment Information | Preferences |

Central Authority Name

Central Authority Name

Save

[Child Support Portal Navigation Guide for iForms – Section 3.5.2.2]

Central Authority Name

The Central Authority Name section allows a name to be assigned to the state Central Authority to use throughout the iForms application.

1. In the **Central Authority Name** field, enter the Central Authority name. Only one Central Authority name can be identified.

2. Select **Save**.

Administration Details

| State Information | Foreign Country Information | Users and Teams |

State Information Details

* Select State

Wisconsin   Go

| Central Authority Name | Local Child Support Office | Central Registry Information | Payment Information | Preferences |

Central Authority Name

Central Authority Name

Save

[Child Support Portal Navigation Guide for iForms – Section 3.5.2.2]

Local Child Support Offices

This section allows you to create or manage office information or upload an Excel file containing the information for all a state's offices.

You can:

- Launch the Upload Office page
- Open a current office for updates
- Add a new office
- Delete an office

Note: Before an office can be deleted, all its active cases must be reassigned.

[Child Support Portal Navigation Guide for iForms – Section 3.5.2.3]

Local Child Support Offices (cont'd)

To change any information:

1. Select the data fields that need updating.

2. Select **Save**.

3. To exit the Manage Offices page and return to the **Local Child Support Office** list, select **Cancel**.

[Child Support Portal Navigation Guide for iForms – Section 3.5.2.3]

Local Child Support Offices (cont'd)

To upload a file:

1. Make sure:
   - The data is in the format of the Upload Excel file in Resources.
   - The file name contains your state code.
2. Select the **Upload Office** tab.
3. Select **Browse**; follow the dialog box prompts to identify the file to upload.
4. Select **Upload**.

Administration Details

| State Information | Foreign Country Information | Users and Teams |

State Information Details

* **Select State**

| Arizona ⌄ | Go |

| Central Authority Name | Local Child Support Office | Central Registry Information | Payment Information | Preferences |

Upload Local Office

| Offices | Upload Office |

* **Choose the Document to upload**

| Browse… | |

Upload

Note: The Upload Office process is only available if no state offices were created.

[Child Support Portal Navigation Guide for iForms – Section 3.5.2.4]

Central Registry Information

Central Registry Information (cont'd)

To add the Central Registry information if one does not yet exist:

1. Select the **Central Registry Information** tab.

2. Enter the **Central Registry**, **Name**, **Address Line1**, **City**, **State**, and **Zip Code**.

3. Enter the **Phone Country Code** and **Phone Number**.

4. Enter the **Fax Country Code** and **Fax Number**.

5. Enter the **Email** address.

6. Enter the **Contact Person Last Name** and **Contact Person First Name**.

7. Select **Save**.

8. To exit the Central Registry Information workflow, select **Cancel.**

Note: There must be one and only one Central Registry per state.

Payment Information

1. Select **Payment Information**.

2. Select **Central Authority Payment Service (CAP)** or **State Disbursement Unit (SDU)**.

3. Enter the **Payable To** information.

4. Select **Save**.

5. To exit, select **Cancel**.

Note: SDU fields are optional. Each state determines the appropriate payment methods for cases.

State Information Details

* Select State

| Alaska ⌄ | Go |

Central Authority Name   Local Child Support Office   Central Registry Information   **Payment Information**   Preferences

Payment Information

* Send Payment To

◉ Central Authority Payment Service (CAP)   ○ SDU

Bank Account Information

* Bank Name	* SWIFT	* Account Holder Name
Orrstown Bank	9876543210	Account Holder Name

* Account Number

123456788

Check Information

* Checks Payable To

Maryland Office of Child Support

* Address Line1	Address Line2	Address Line3
123 Main St	AL2	AL3

* City	* State	* Zip Code
Annapolis	MD	21401

Save

Preferences

To set preferences:

1. Select **Preferences**.
2. Check **Require manager approval of the Forms**.
3. Check **Allow the caseworker to reassign cases to other caseworkers/Teams**.
4. Check **Allow the use of the custodial party's personal address instead of the local child support office address**.
5. Select user name type for form completion:
   - **Person completing the form** is the default.
   - If **Representative**, enter the exact character string.
6. Select **Save**.

OCSS Administrator – Users and Teams

- Select the **Users and Teams** tab:
  - Members can be edited and deleted.

Administration Details

State Information   Foreign Country Information   Users and Teams

Team Information

Team Name	Email	Phone	Team Address	Edit Members	Delete Team
local maryland team	mdcseuser3@mdcse.com	4105555555	333 Memory Lane, Suite 301, 3rd Floor, Annapolis, MD, 21401 US	Edit Members	Delete
Maryland CSE Team 1	MDCSETeam1@mdcse.com	4105555555	13 Uptown St, Down Town, MD, 28100 US	Edit Members	Delete

Create New Team

User Information

Last Name	First Name	Email	Phone	Team Name
user	test	test@ssa.gov		local maryland team
test	test	test123@test.com	4105555555	Maryland CSE Team 1
user	test	test@ssa.gov		Maryland CSE Team 1

Create New User

[Child Support Portal Navigation Guide for iForms – Section 3.5.2.6]

Create New User (Step 1 of 3)

1. Select **Users and Teams**.
2. Select **Create New User**.

User Information
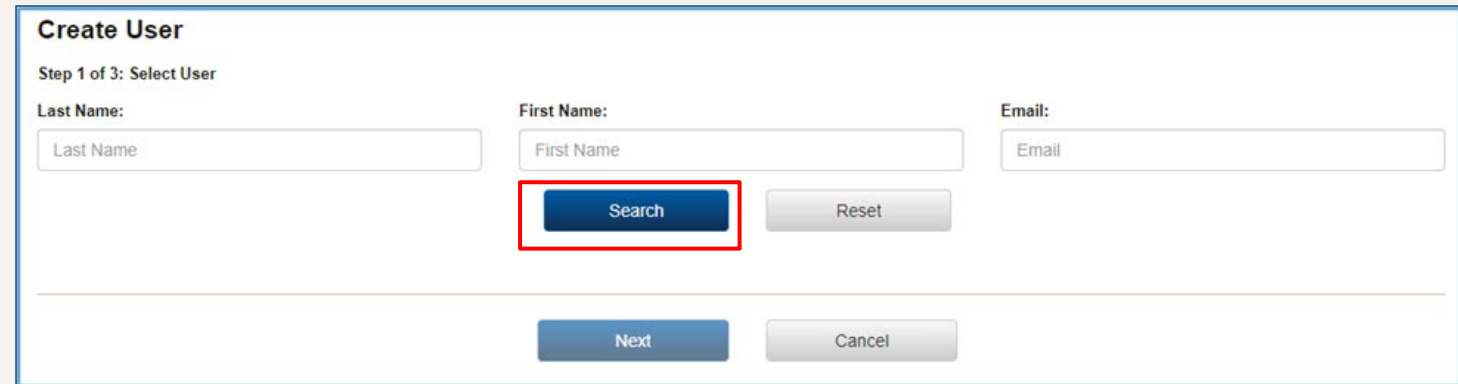
	Last Name		First Name		Email		Phone		Team Name
	user		test		test@ssa.gov				local maryland team
	test		test		test123@test.com		4105555555		Maryland CSE Team 1
	user		test		test@ssa.gov				Maryland CSE Team 1

Create New User

Note: iForms users can be selected from active Portal users.

[Child Support Portal Navigation Guide for iForms – Section 3.5.2.6]

Create New User (Step 1 of 3 cont'd)

3. Select **Users and Teams**.

4. Select **Create New User.**

5. Select any combination from the three data fields shown.

6. Select **Search**.

Create User

Step 1 of 3: Select User

Last Name:	First Name:	Email:
Last Name	First Name	Email

Search   Reset

Next   Cancel

Note: iForms users can be selected from active Portal users.

[Child Support Portal Navigation Guide for iForms – Section 3.5.2.6]

Create New User (Steps 2 and 3 of 3)

1. Select the team the user will be a member of (optional).

2. Take one of the following steps:

   - If a team is selected, select **Next**.

   - If no team was selected, select **Skip**.

Create User

Step 2 of 3: Select Team

-- SELECT --

Previous   Skip   Next   Cancel

[Child Support Portal Navigation Guide for iForms – Section 3.5.2.6]

Create New User (Steps 2 and 3 of 3 cont'd)

3. Select the office the user will work for.

4. Select **Create User**.

Note: iForms users are not required to be members of a team.

Create User

Step 3 of 3: Finalize

	Last Name		First Name		Work Phone		Work Email		Selected Languages		Additional Languages		Role - Manager
	officeofchildsupportldaptest		officeofchildsupportldaptest				test@california.com		None		None selected ▾		☐

* Office

-- SELECT -- ⌄

Previous   Create User   Cancel

Create New User (Step 3 of 3 cont'd)

1. Select all the languages spoken by the user.

2. Select whether the user is a manager.

3. Select the office the user will work for.

4. Select **Create User**.

Create User

Step 3 of 3: Finalize

	Last Name		First Name		Work Phone		Work Email		Selected Languages		Additional Languages		Role - Manager
	user		test				test@ssa.gov		None		None selected ▾		☐

Team Name:
Maryland Local Authority Test

iForms Phone:
5551234567

iForms Email:
mdcseuser1@mdcse.org

* Office

-- SELECT --

[Previous] [**Create User**] [Cancel]

Edit New User

1. On the **Administrator** tab, select **Users and Team**.

2. Select the **Last Name** of the user from the **User Information** list.

3. Choose the data fields that need updating.

4. Select **Save**.

Edit User
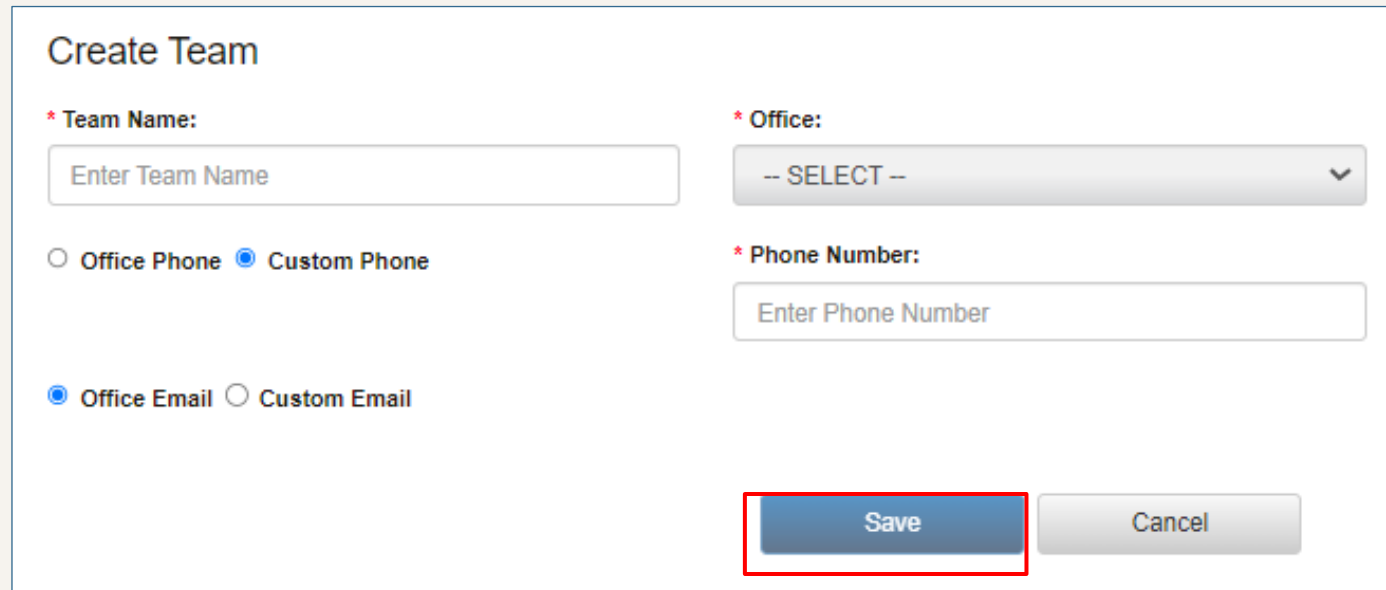
User Name: test user	*** Phone Number:** 5557654321	*** Email** test@ssa.gov
Role - Manager: ☐	*** Office:** Local Child Support Office ⌄	**Address:** 13 Uptown St, Down Town, MD, 28100, US
Selected Languages: French	**Additional Languages:** French ▾	

Save   Cancel

Create Team

1. On the **Administrator** tab, select **Users and Teams**.
2. Select **Create New Team**.
3. Enter the team's name.
4. Select the local child support office for the team.

5. Select **State Phone** and, if **Custom Phone** is selected, enter the phone number associated with the team.
6. Select **State Email** and, if **Custom Email** is selected, enter the email address associated with the team.
7. Select **Save**.

Create Team

* Team Name:

[Enter Team Name]

○ Office Phone ◉ Custom Phone

◉ Office Email ○ Custom Email

* Office:

[-- SELECT -- ▾]

* Phone Number:

[Enter Phone Number]

[Save]   [Cancel]

Edit Team

1. In the **Team Name** field, select the team.

2. Choose the data fields that need updating.

3. Select **Save**.

Note: Some data, such as the state office address, cannot be edited here. Change it on the **Local Child Support Office** tab.

Edit Team

Team Name:

Test Team of Maryland

○ Office Phone ● Custom Phone

○ Office Email ● Custom Email

* **Office:**

Local Child Support Office

* **Phone Number:**

1234567890

* **Email**

office1@office.com

Address:

13 Uptown St, Down Town, MD, 28100, US

Save   Cancel

Delete Team / Edit Members

Select-**Users and Teams**:

- To delete a team, select **Delete**.

  Note: All active cases must be reassigned before a team can be deleted.

- To edit members:
  a. Select **Edit Members**.
  b. Make the updates.
  c. Select **Save**.

[Child Support Portal Navigation Guide for iForms – Section 3.5.2.6]

OCSS Administrator – Add / Manage Resources

1. Select **Resources**.

2. Select the applicable resource.

    The OCSS Administrator manages the 2007 Hague Convention Application Checklists, 2007 Convention general resources, Foreign Country resources, and if requested, the state's resources.

3. Select **Add**.

[Child Support Portal Navigation Guide for iForms – Section 3.5.2.7]

Application Checklists

To upload:

1. Select **Resources**.

2. Select **Application Checklist**.

3. Select **Application Type**.

4. Select **Browse**; follow the dialog box workflow to identify the file to upload.

5. Take one of these steps:

   - To upload the file, select **Upload Checklist**.
   - To exit the upload process, select **Cancel**.

[Child Support Portal Navigation Guide for iForms – Section 3.5.2.7]

Add Resources – 2007 Convention

1. Select **Resources**.
2. Select **2007 Convention**.
3. If the resource is stored:
   a. Select **Document**.
   b. Follow the **Browse** dialog box's workflow to specify the file to upload.
   c. Take one of these steps:
      - To upload the file, select **Open**.
      - To exit, select **Cancel**.
4. If the resource is a link:
   a. Select **Link**.
   b. Enter the **URL** of the resource location.

c. To add the URL, select **Open**.

d. To exit, select **Cancel**.

When the URL is successfully added, a green banner displays.

Add / Edit / Delete State Resource

1. Select **State Resources** ~~tab~~.

2. In the **Select State** menu, select the state.

3. Take one of these steps:

   - To add a resource, select **Add State Resource**:

     i. Add a resource using one of the following methods:

        - Link to the current URL location of the resource

        - Upload a file to iForms that users can access

     ii. Select **Resource Type**.

   iii. Select **Save**.

Add / Edit / Delete State Resource (cont'd)

- To edit resource information, select **Edit**.
- To delete a resource, select **Delete**.

Add State Resource

* Resource Name

Enter Resource Name

* Resource Description

Enter Resource Description

* Choose Resource Type

○ Document ○ Link

Save   Cancel

Questions